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MedServices

Patient Records

User Manual

Version 5

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User's Guide

All of the software features, steps, and system values are include in this manual, but may not be available to every user. The following Icons will be used throughout this and other MedServices manuals.

UNIVERSAL COMMAND: A command that will work in all modules or is a common operation in all modules.

SHORT CUT: This is a time saving tip or another way to do the same task.

IMPORTANT: Pay close attention to these directions.

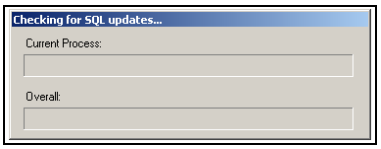
DATABASE: Information about the information stored in MedServices.

DataNet Solutions is a custom software solution provider. We value the input of our users and strive to constantly improve the software. As a result, the user manuals and guides are living documents and may not contain a current screen shot. Please don't hesitate to send an email to **sales@datanetsolutions.org** and give us a friendly reminder.

Before you can login to MedServices, you must have a User Name and Password. Only users with Administrative rights can set up new users and reset passwords.

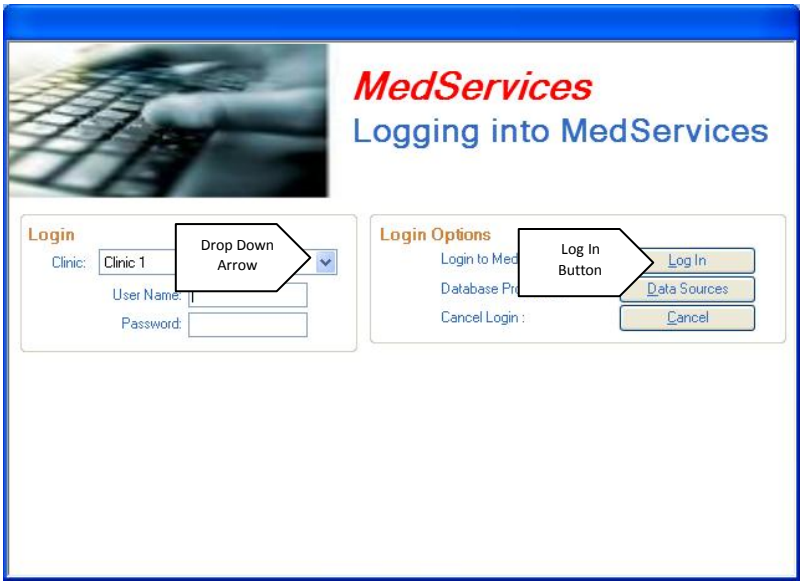
Logging In

Updates: MedServices automatically checks for updates each time the software is opened.



Logging into MedServices:

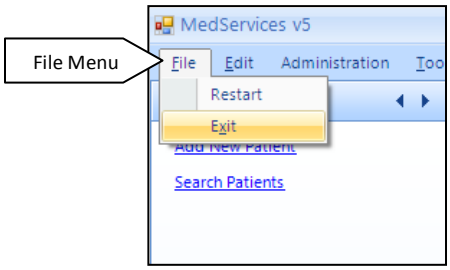
1. Click on the drop down arrow to display a list of clinic names.
2. Click on the desired clinic name to enter the clinic name into the Clinic text box.
3. Hit the TAB key on the keyboard to move the cursor to the User Name Field
4. Type in a User Name
5. Hit the TAB key on the keyboard to move the cursor to the Password Field
6. Click on the Log In button



User Names and Passwords are case sensitive. Each user is assigned permission to Add, View, Edit, or Delete data in each module. Only users with Administrative rights can change these permissions.

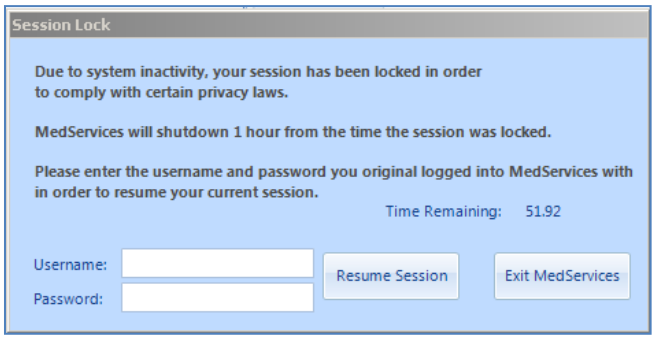
Logging out of MedServices:

1. From the File menu select the Exit command or click on the X button in the top right corner of the MedServices V5 Window.



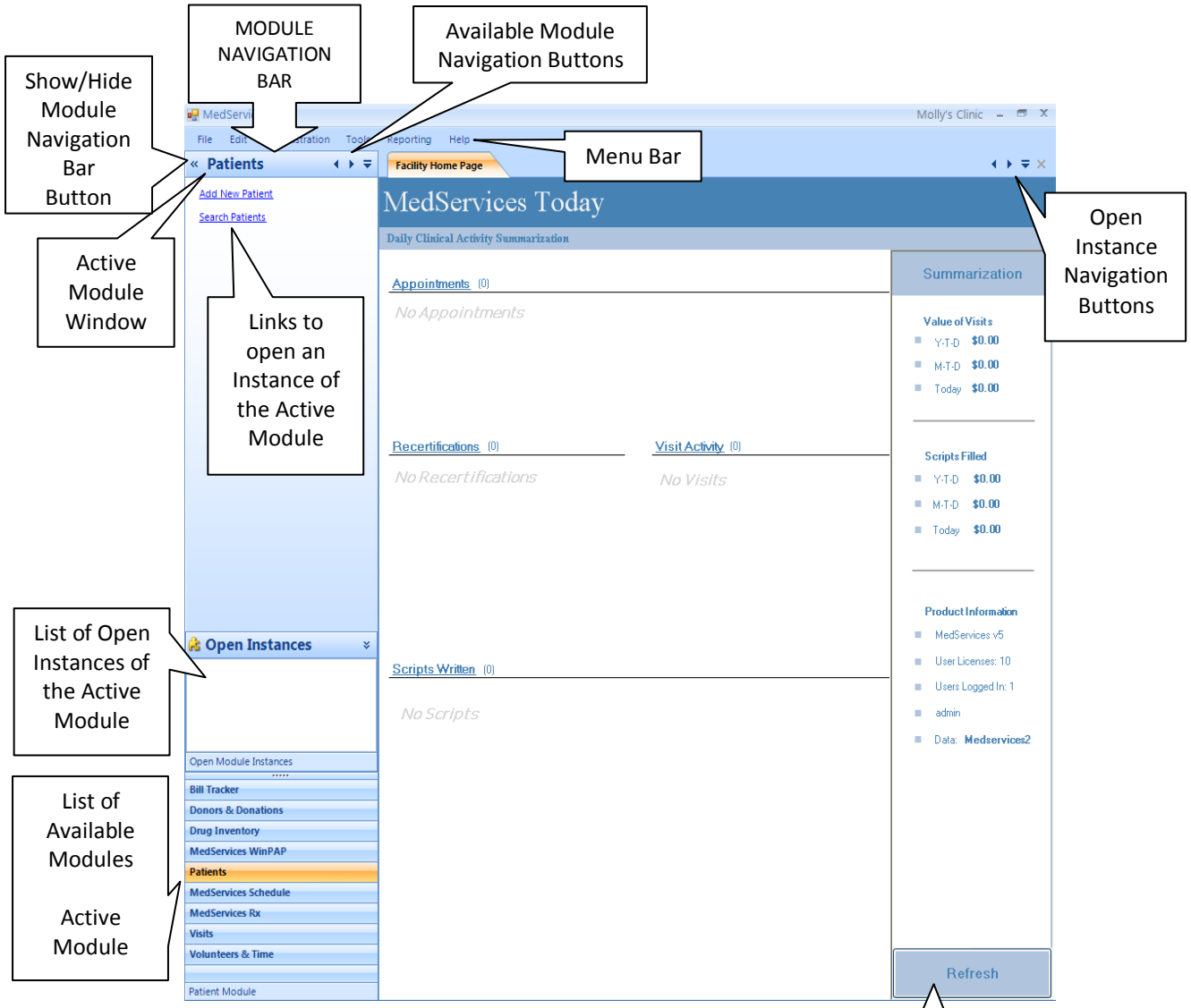
2. Click on the Log Out button to Exit

MedServices will automatically lock the screen and require the user to log back in after 10 minutes of inactivity. This is a system setting dictated by HIPAA requirements and cannot be changed by an Administrator.


Session Lock
Due to system inactivity, your session has been locked in order to comply with certain privacy laws.
MedServices will shutdown 1 hour from the time the session was locked.
Please enter the username and password you original logged into MedServices with in order to resume your current session.
Time Remaining: 51.92
Username:
Password:
Resume Session
Exit MedServices

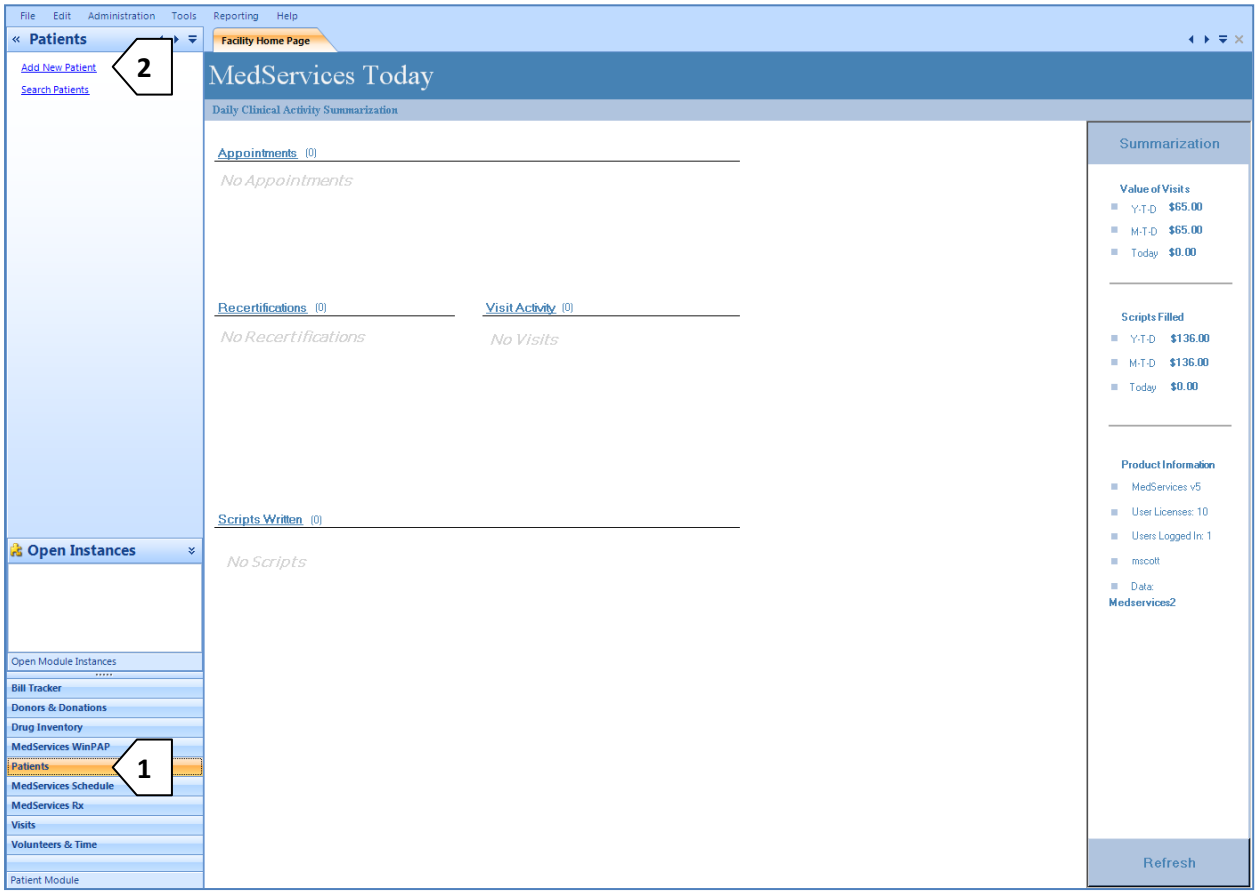
Facility Home Page

MedServices opens with the MedServices Today page displayed on the Facility Home Page Tab. Statistics from the current days activities are tracked on the MedServices Today page. The Patient Module is the default Active Module.



The Clinic's Database automatically refreshes every 3-5 minutes. When making a change to the system like entering a new patient or scheduling an appointment, other users will be able to see the update within 3-5 minutes. Users can manually refresh their system by using the Refresh Button.

Creating a New Patient Record



1. Click on **Patients** in the list of available modules to make the Patient's Module the Active Module
2. Click on the **Add New Patient** link in the Active Module window to launch the New Patient Wizard

New Patient Wizard

Step 1: Welcome

All of the software features, steps, and system values are included in this manual, but may not be available to every user. The numbers of steps displayed in the Wizard and the system values accessible within each step are controlled by the Clinic's Administrator. As a result, users will only be able to access the system values selected by the Clinic's Administrator. Pressing the TAB key on the keyboard will bypass any excluded values.

The buttons visible on the screen are dependent on which modules the clinic has purchased. For example the DOCUMENT button is only available to clinics that have purchased the Document Management with Workflow module.

Required values will display in yellow and the user will be prompted to complete these fields before moving to the next step. First and Last Name are required by MedServices and cannot be reset by the Clinic Administrator.

The New Patient Wizard must be completed. The user cannot switch to another module until the Wizard is completed or canceled.

Step 2: Patient Profile I

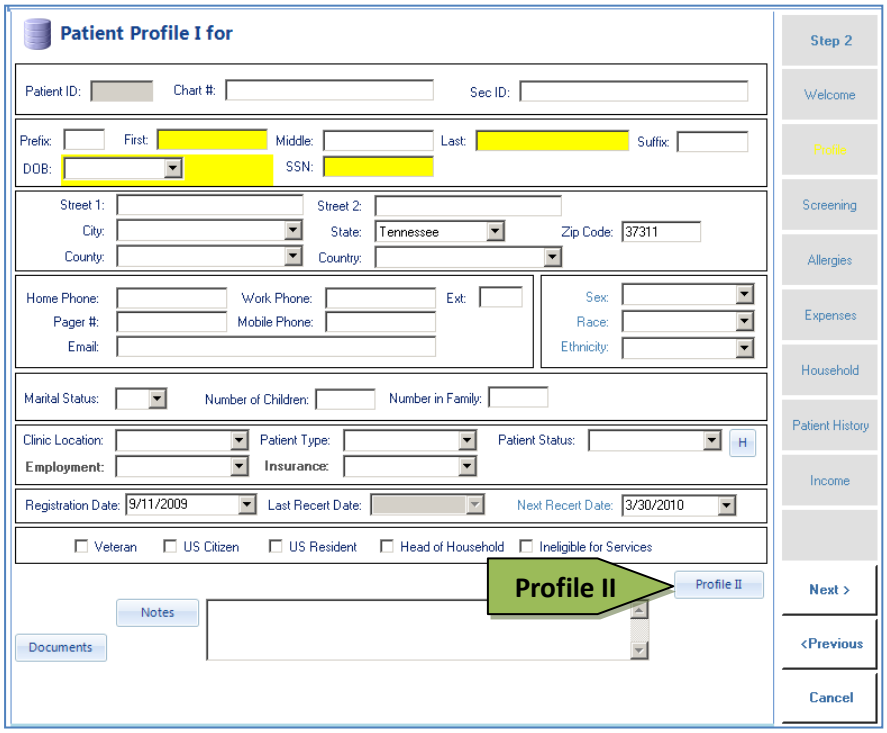
1. Click on the Start button
2. A Patient ID number is automatically assigned to the patient record by MedServices
3. Enter each additional system value or select a system value from the list if available
4. **Yellow** fields are required
5. **Gray** fields are disabled and cannot be accessed
6. Use the TAB key on the keyboard to move from field to field. (Disabled fields will be skipped)

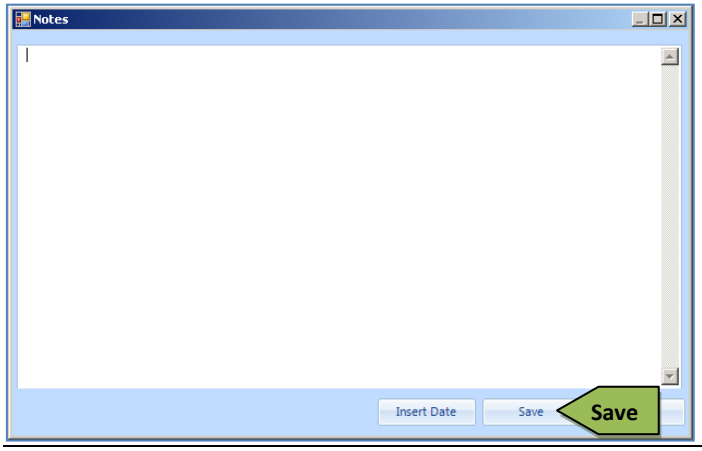
MedServices checks for duplicate records based on Social Security Number or the combination of First Name + Last Name + Date of Birth. A warning message will display if a duplicate record is found.

State/Zip Code/Phone may auto-populate with system values set by the Clinic's Administrator. Select a different system value from the list (if available) or highlight the entire value and type in a different value.

Registration Date defaults to the current date. Drop down the calendar using the arrow and select a different date or highlight the entire date in the Registration Date field and type in a different date using the mm/dd/yyyy format

Next Recert Date is auto-calculated based on the Registration date plus the Clinic's days to recertification setting. Drop down the calendar using the arrow and select a different date or highlight the entire date in the Next Recert Date field and type in a different date using the mm/dd/yyyy format



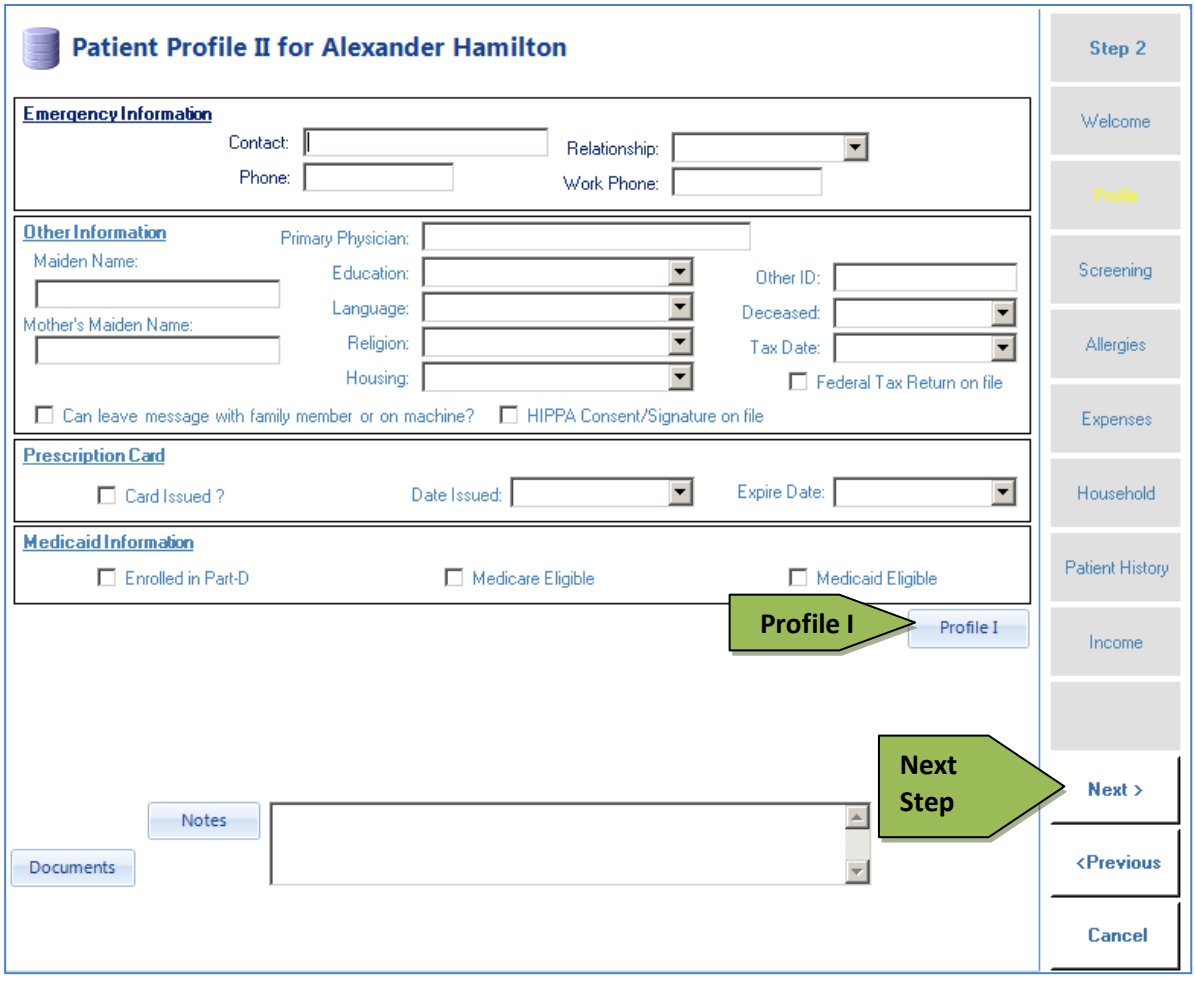


Notes can be added in the text box or by clicking on the **Notes** button to access a larger text box.

Click on the Save button in the larger text box before returning to the Wizard.

Step 2: Profile II

1. Click on the Profile II button
2. Enter each additional system value or select a system value from the list if available
3. Yellow fields are required
4. Gray fields are disabled and cannot be accessed
5. Use the TAB key on the keyboard to move from field to field. (Disabled fields will be skipped)
6. Click on the Profile 1 button to return to Profile 1 or Click on the Next button to move to Step 3



Step 3: Screening Question Record

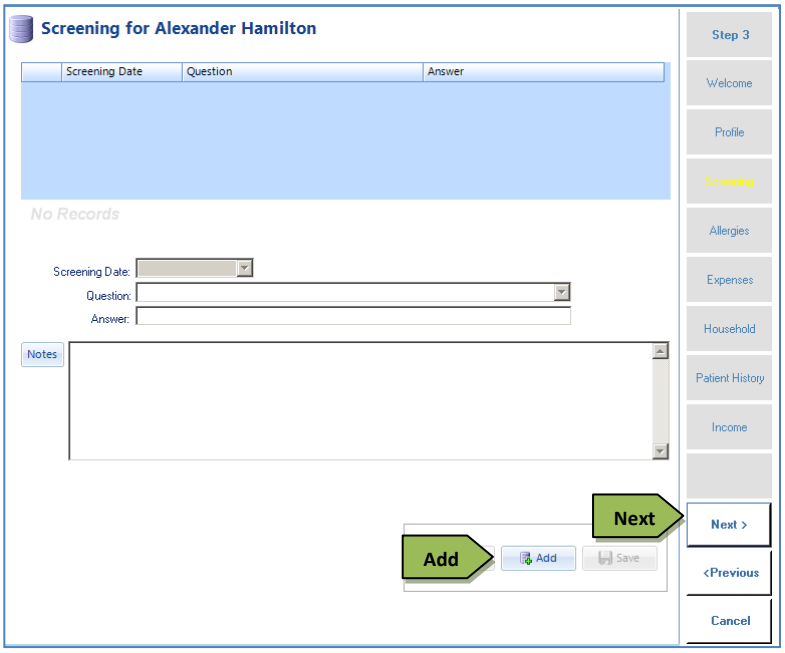
Add a Screening Question

1. Click on the Add button
2. Enter a Screening Date
3. Select a Question
4. Type the patient's answer to the question into the Answer field
5. Use the Notes field to record additional details
6. Click on the Save button

Repeat steps 1-6 to add each additional Screening Question

Edit a Screening Question

1. Select the question in the table
2. Make corrections to the system values in the necessary fields
3. Click on the Save button



Click on the Next button to move to Step 4

Step 4: Allergies Record

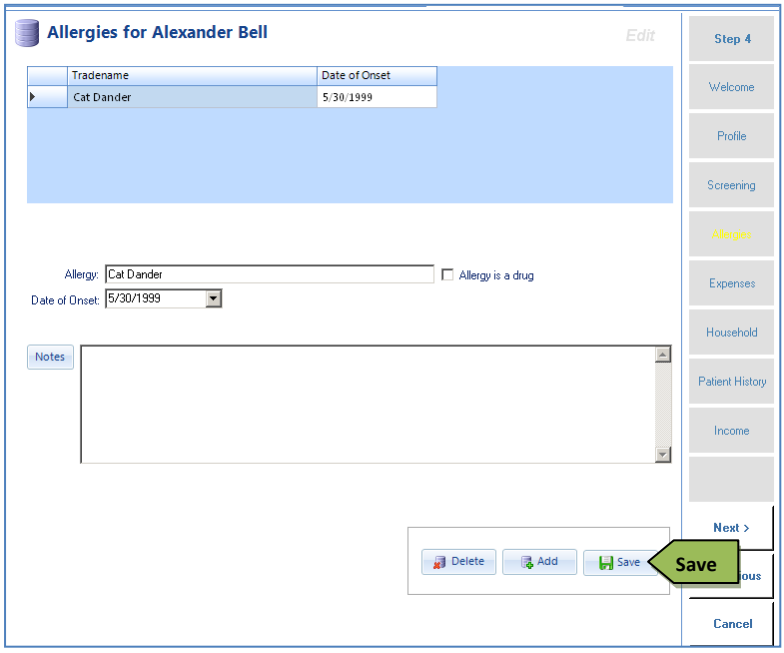
Add an Allergy

1. Click on the Add button
2. Enter a description of the Allergy
3. Check the **Allergy is a drug** box if applicable
4. Enter a Date of Onset
5. Use the Notes field to record additional details
6. Click on the Save button

Repeat steps 1-6 to add each additional Allergy

Edit an Allergy

1. Select the Allergy in the table
2. Make corrections to the system values in the necessary fields
3. Click on the Save button



Click on the Next button to move to Step 5

Step 5: Expense Record

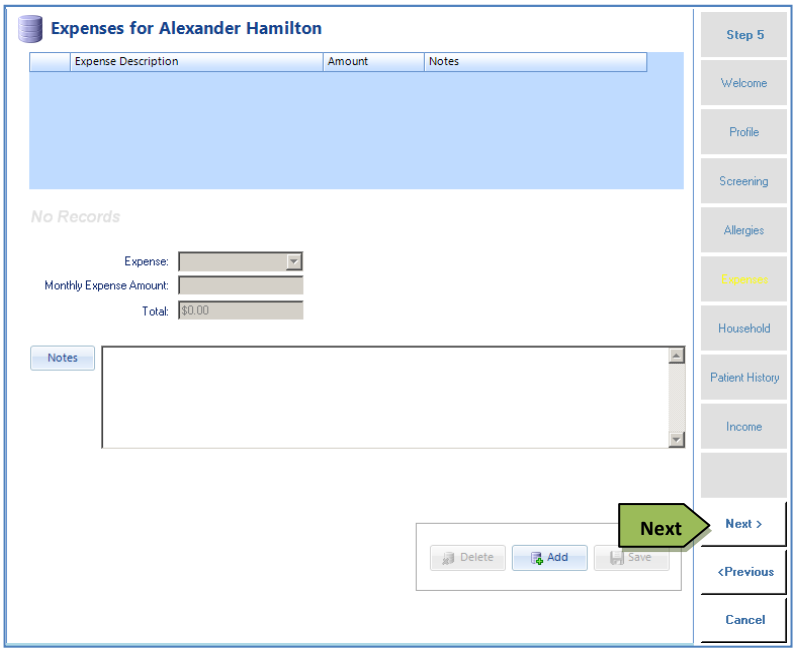
Add an Expense

1. Click on the Add button
2. Select an Expense from the list
3. Enter the Monthly Expense Amount
4. Use the Notes field to record additional details
5. Click on the Save button

Repeat steps 1-5 to add each additional Expense

Edit an Expense

1. Select the Expense in the table
2. Make corrections to the system values in the necessary fields
3. Click on the Save button



Click on the Next button to move to Step 6

Step 6: Household Member Record

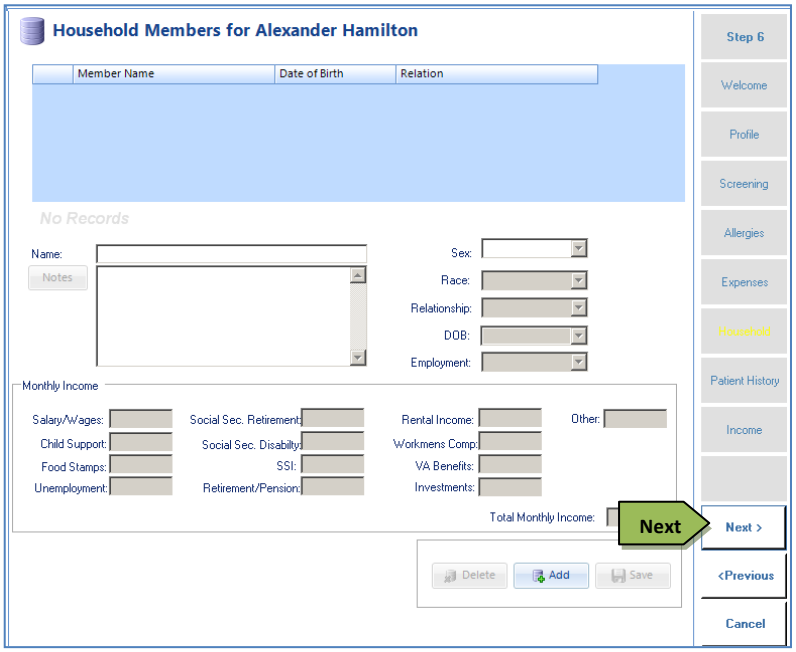
Add a Household Member

1. Click on the Add button
2. Enter each system value or select a system value from the list
3. Use the TAB key on the keyboard to move from field to field
4. Use the Notes field to record additional details
5. Click on the Save button

Repeat steps 1-5 to add each additional Household Member

Edit a Household Member

1. Select the Household Member in the table
2. Make corrections to the system values in the necessary fields
3. Click on the Save button

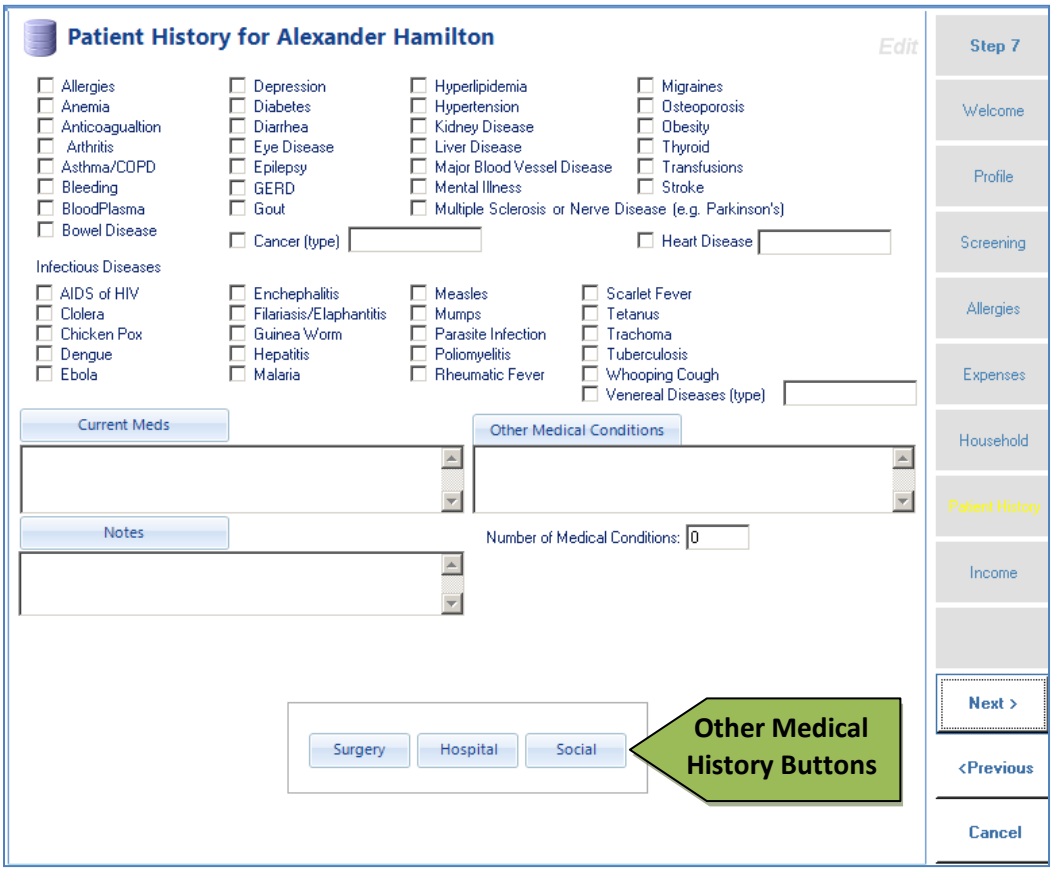


Click on the Next button to move to Step 7

Step 7: Patient History Record

The Patient History step includes Surgical, Hospital, and Social history records. These records are accessed through a button at the bottom of the Patient History window.

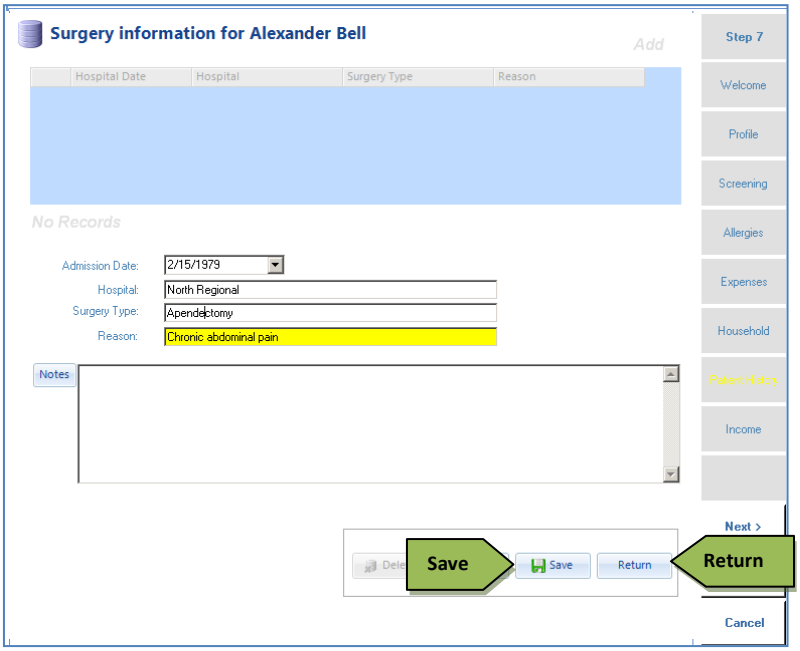
1. Check each medical condition to include in the Patient's History.
2. Enter additional details where necessary
3. Enter the Patient's Current Meds. The Current Meds field is a record of the medication being taken when the patient registered as a new patient with the clinic. Any medication prescribed by the Clinic will be recorded in the Patient's Visit.
4. Use the Notes field to record additional details
5. Number of Medical Conditions will automatically display the total number of conditions checked



Add Surgical History

1. Click on the Surgery button
2. Click on the Add button
3. Enter each system value
4. Use the Notes field to record additional details
5. Click on the Save button
6. Click on the Return button to return to the Patient History window

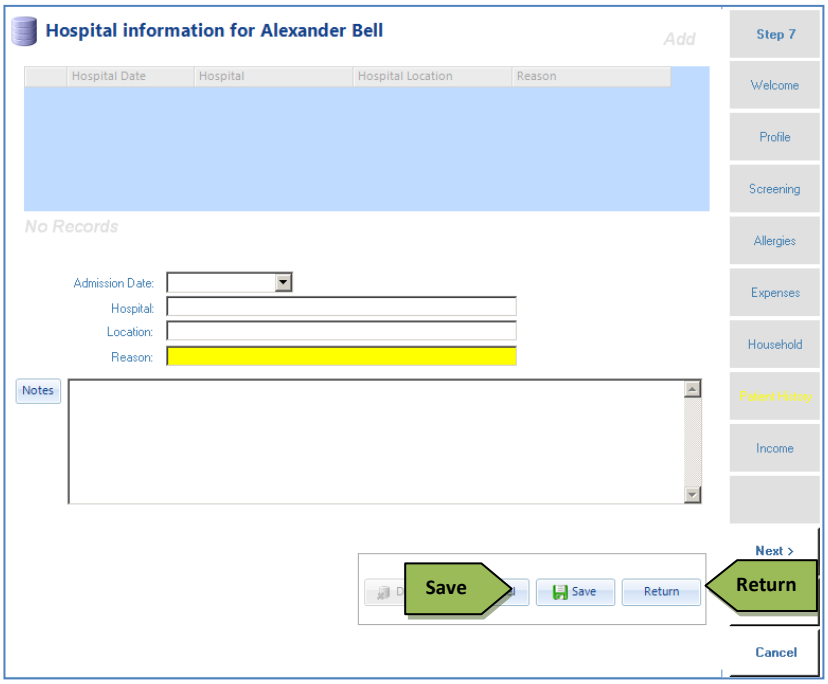
Repeat steps 1-5 to add each additional Surgery



Edit a Surgery

1. Select the Surgery in the table
2. Make corrections to the system values in the necessary fields
3. Click on the Save button
4. Click on the Return button to return to the Patient History window

Add Hospitalization History



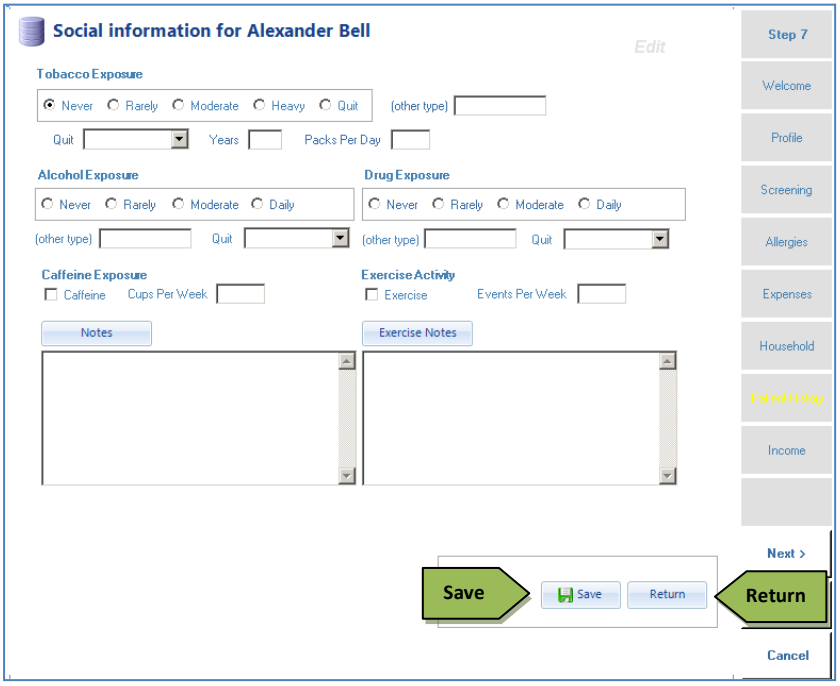
1. Click on the Hospital button
2. Click on the Add button
3. Enter each system value
4. Use the Notes field to record additional details
5. Click on the Save button
6. Click on the Return button to return to the Patient History window

Repeat steps 1-5 to add each additional Hospitalization

Edit a Hospitalization

1. Select the Hospitalization in the table
2. Make corrections to the system values in the necessary fields
3. Click on the Save button
4. Click on the Return button to return to the Patient History window

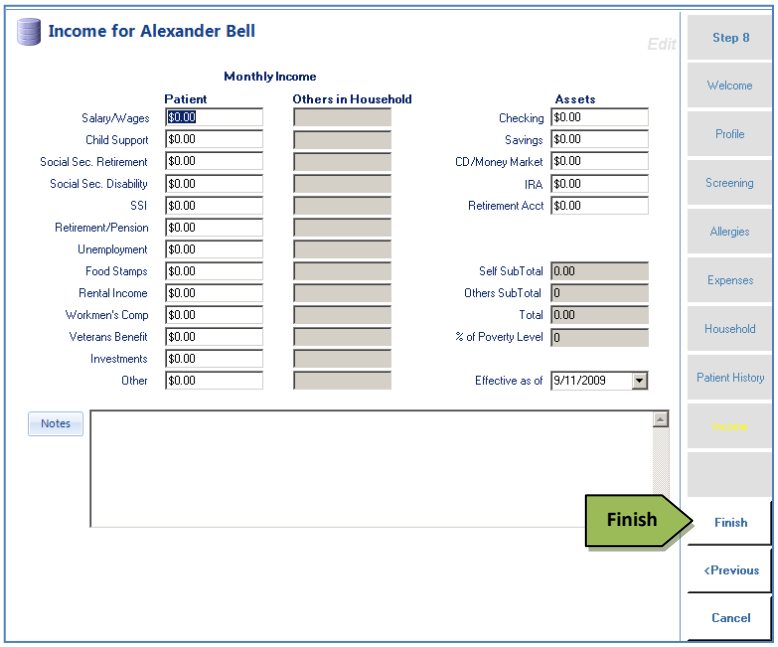
Add Social History (Tobacco, Alcohol, Drug, Caffeine, Exercise)



1. Click on the Social button
2. Record the exposure level for each category. Enter additional system values where needed.
3. Use the Notes fields to record additional details
4. Click on the Save button
5. Click on the Return button to return to the Patient History window

Step 8: Patient Income

1. Enter the Patient's Monthly Income and Assets for each category
2. Use the Tab key on the keyboard to move from field to field
3. Use the Notes field to record additional details
4. The Subtotal, Total, and % of Poverty Level numbers will update automatically
5. The **Effective as of** date defaults to the current date. Drop down the calendar using the arrow and select a different date or highlight the entire date in the **Effective as of** field and type in a different date using the mm/dd/yyyy format



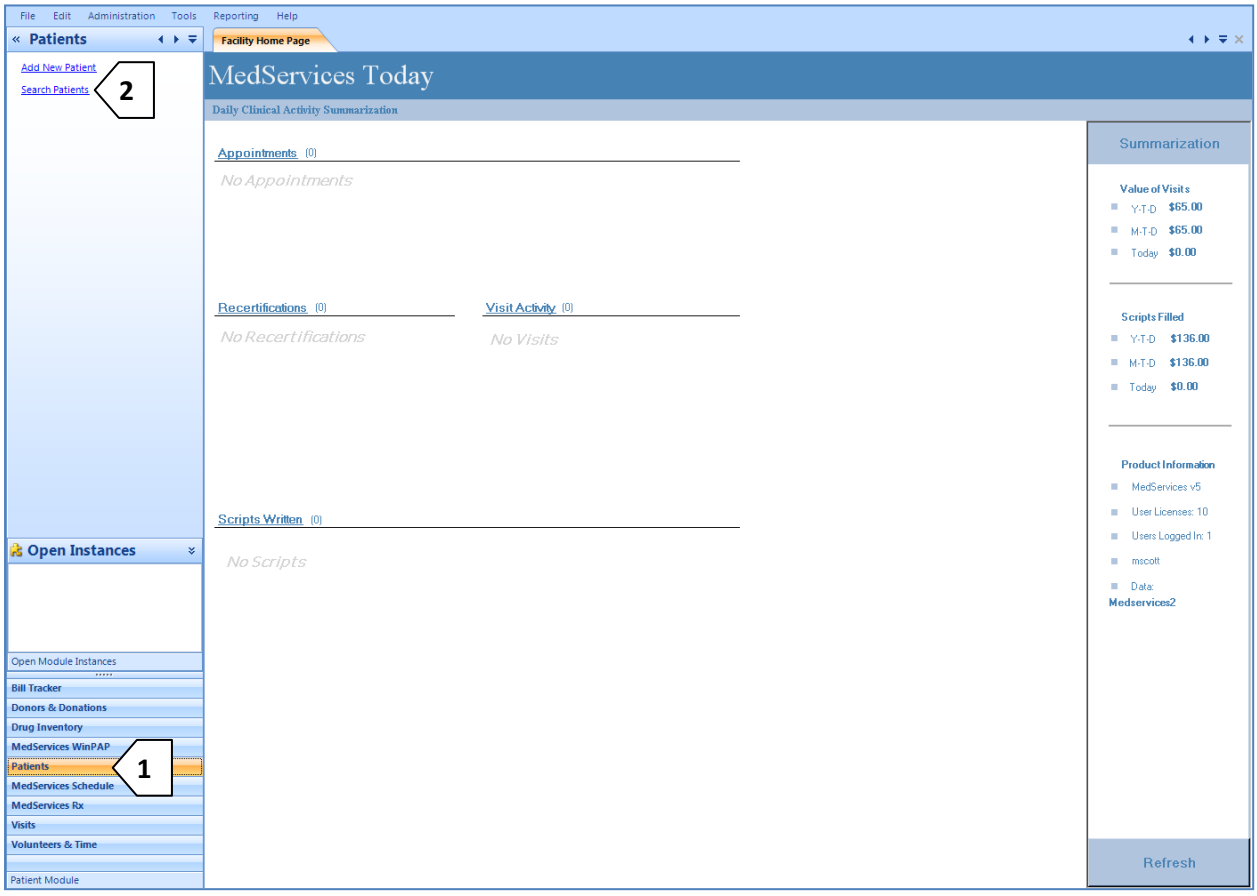
Click on the Finish button to complete the Wizard and create the New Patient's Record

Patient Records

Once the patient record has been created, each of the steps in the wizard is recorded on a separate tab in the patient's record. Additional details about the Patient's Employment and Insurance can be added. Alerts can be recorded that display whenever the patient record is accessed by another module. The Patient Status, Recertification Date and all Alerts display whenever the patient record is accessed by any module.

Opening a Patient Record

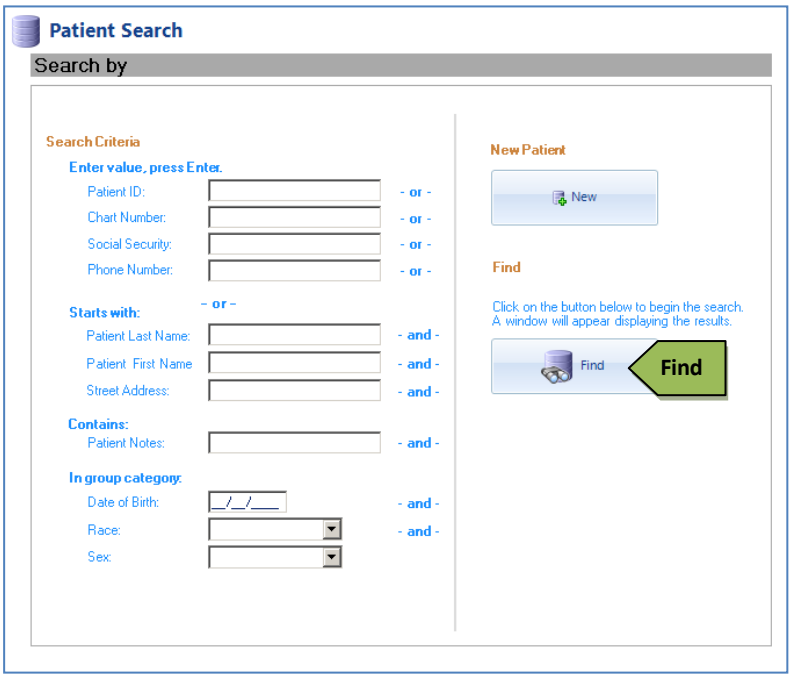
Use the Search Patients feature to open an existing Patient Record.



1. Click on **Patients** in the list of available modules to make the Patient's Module the Active Module
2. Click on the **Search Patient** link in the Active Module window to launch the Search

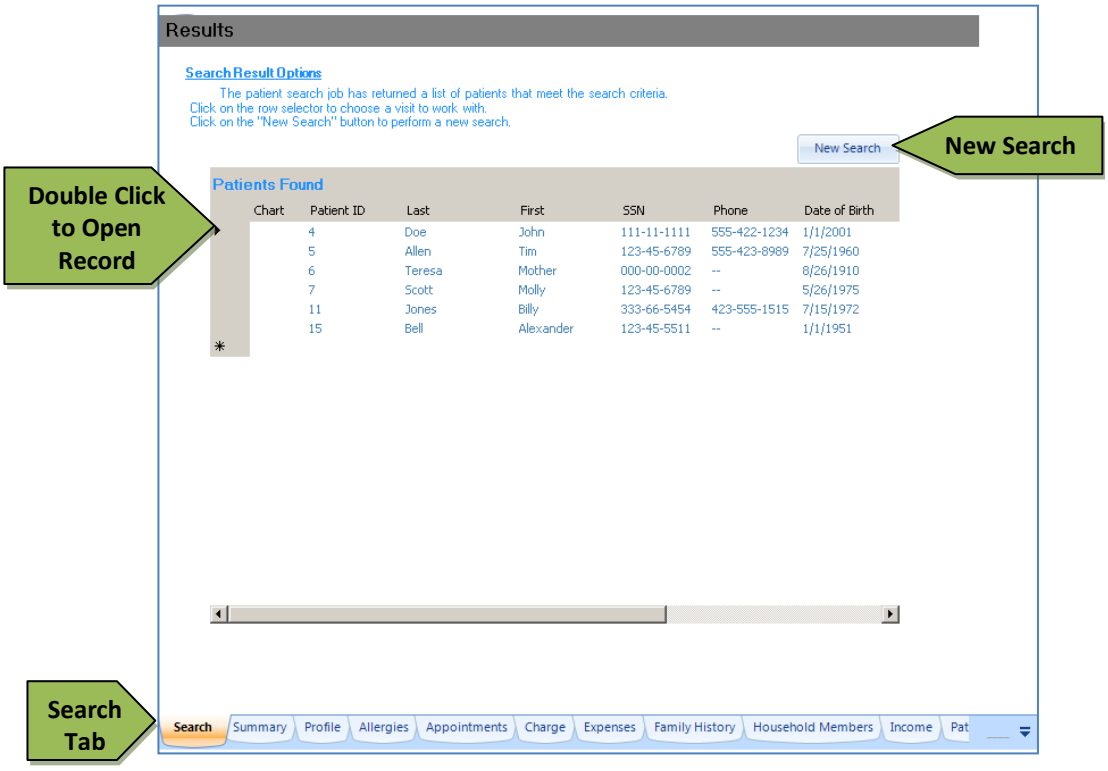
3. Enter search criteria for finding the record

MedServices can search by partial values. To search for John enter “Jo” in the Patient First Name field

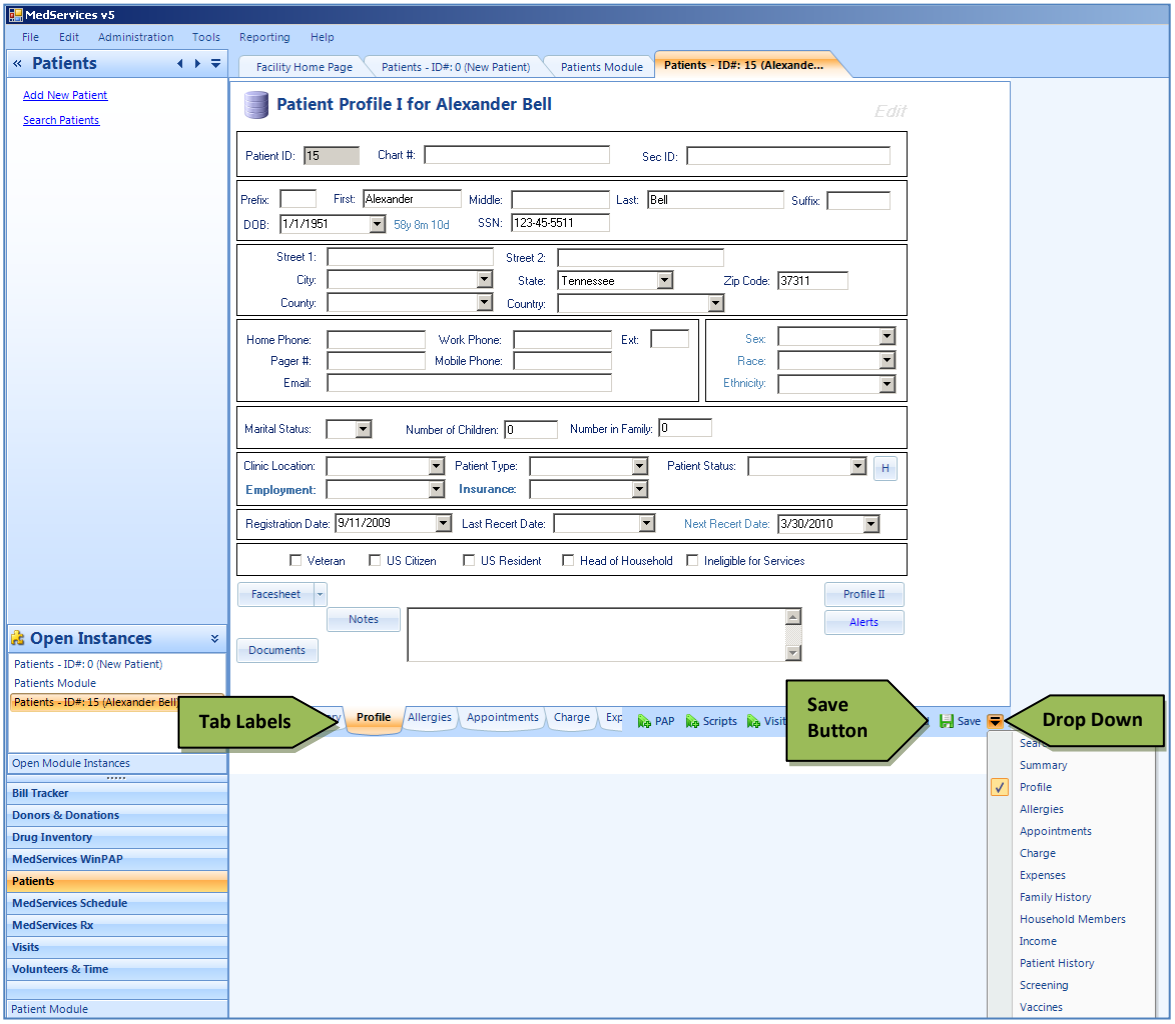


4. Click on the Find button to launch the search (the first 4 search criteria an be launched using the Enter key)
5. Running the search without criteria will display a list of all the patient records
6. Search results will be displayed on the Search tab in the Patient Module
7. MedServices will notify the user if no records match the search criteria

8. Double click on the gray box next in the first column of the Results table to open the Patient’s Record
9. Click on the New Search Button to reload the Search window



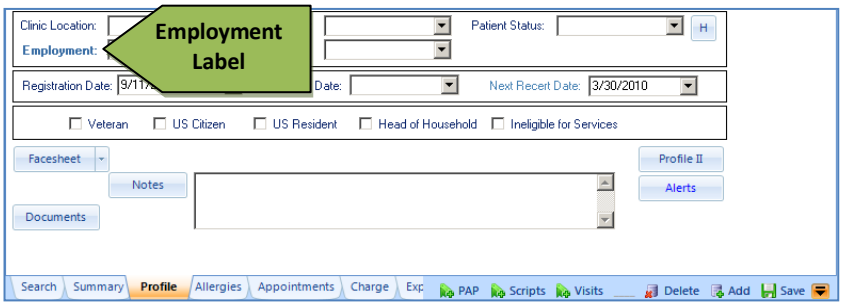
Edit a Patient Record

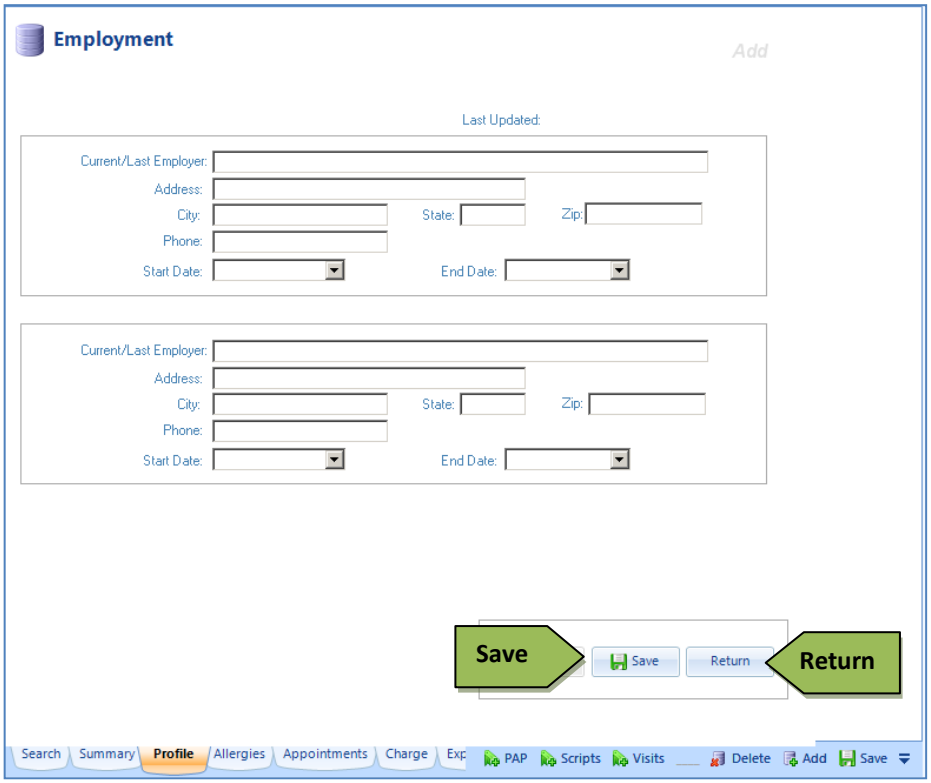


1. Make corrections to the system values in the necessary fields
2. Click on the Save button before moving to a different tab
3. Navigate through the record tabs by clicking on the Tab Labels or by clicking on the Drop Down Arrow and selecting a tab from the list

Add Employment Details

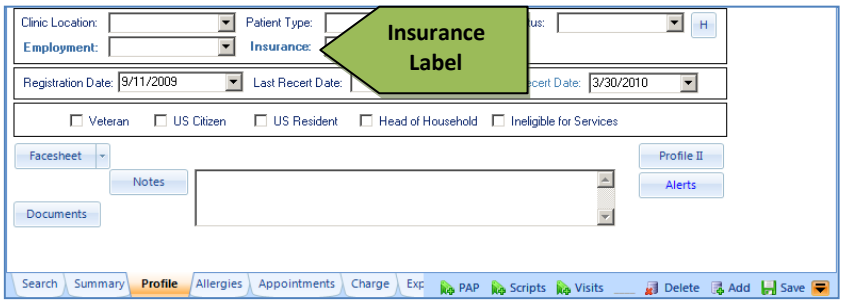
1. Click on the Employment Field Label in the Patients Profile I window on the Profile Tab
2. Record the Patient's Employment History
3. Use the TAB key on the keyboard to move from field to field
4. Click on the Save button
5. Click on the Return button to return to the Patient's Profile window

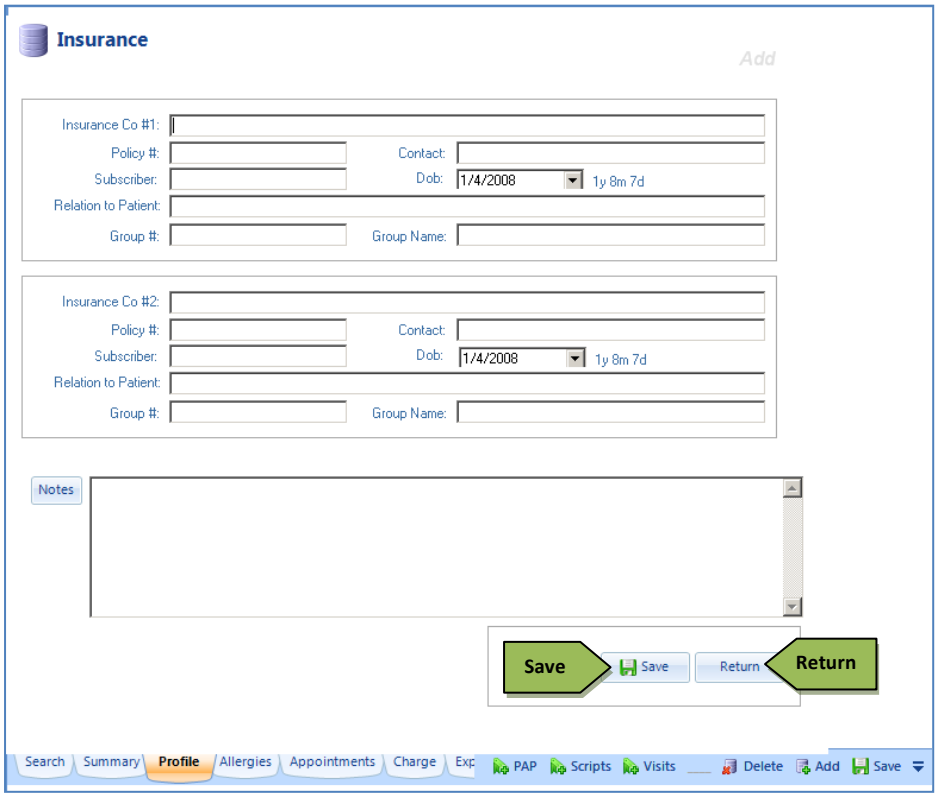




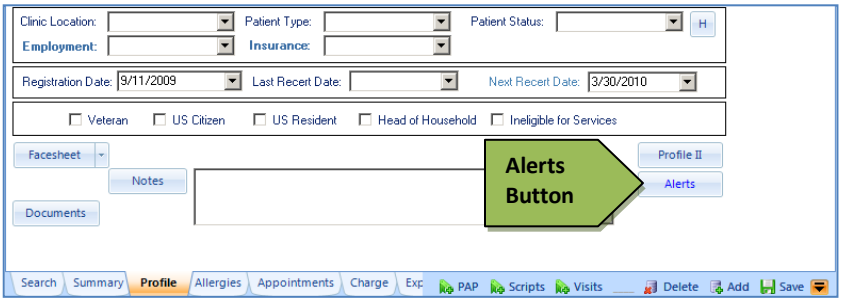
Add Insurance Details

1. Click on the Insurance Field Label in the Patients Profile I window on the Profile Tab
2. Record the Patient's Insurance Details
3. Use the Notes field to record additional details
4. Use the TAB key on the keyboard to move from field to field
5. Click on the Save button
6. Click on the Return button to return to the Patient's Profile window





Add Alerts

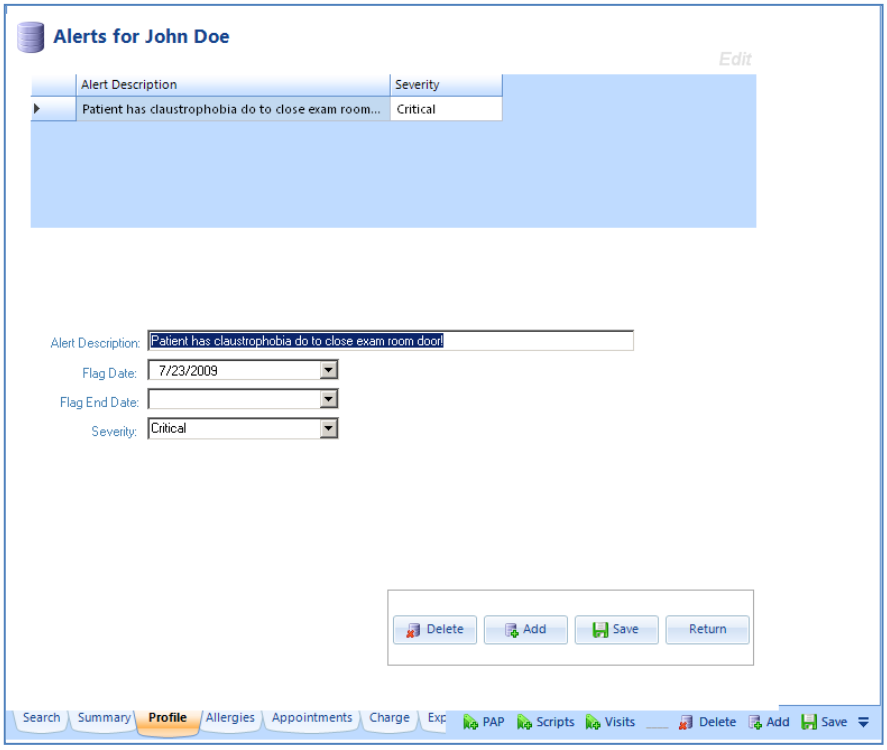


1. Click on the Alerts button in the Patients Profile I window on the Profile Tab
2. Click on the Add button
3. Enter each system value
4. Use the Notes field to record additional details
5. Click on the Save button
6. Click on the Return button to return to the Patient Profile Tab

Repeat steps 1-5 to add each additional Alert

Edit an Alert

1. Select the Alert in the table
2. Make corrections to the system values in the necessary fields
3. Click on the Save button
4. Click on the Return button to return to the Patient Profile Tab



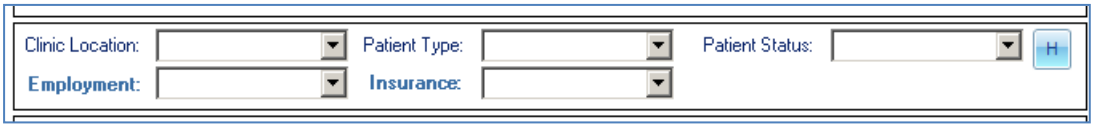
The Alerts button will turn red shortly after the Alerts have been entered

Display Patient Alerts

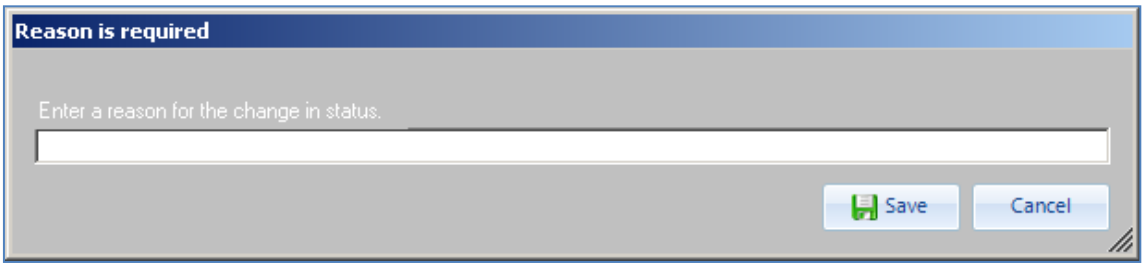
1. Click on the Alerts button to display the Alerts window
2. Click on the Return button to return to the Patient Profile Tab

Tracking Patient Status Change History

Clinics tracking Patient Status changes will see the H button next to the Patient Status field on the Profile Tab. Each time the Patient Status is changed, the user will be prompted to enter a reason for the Status change.



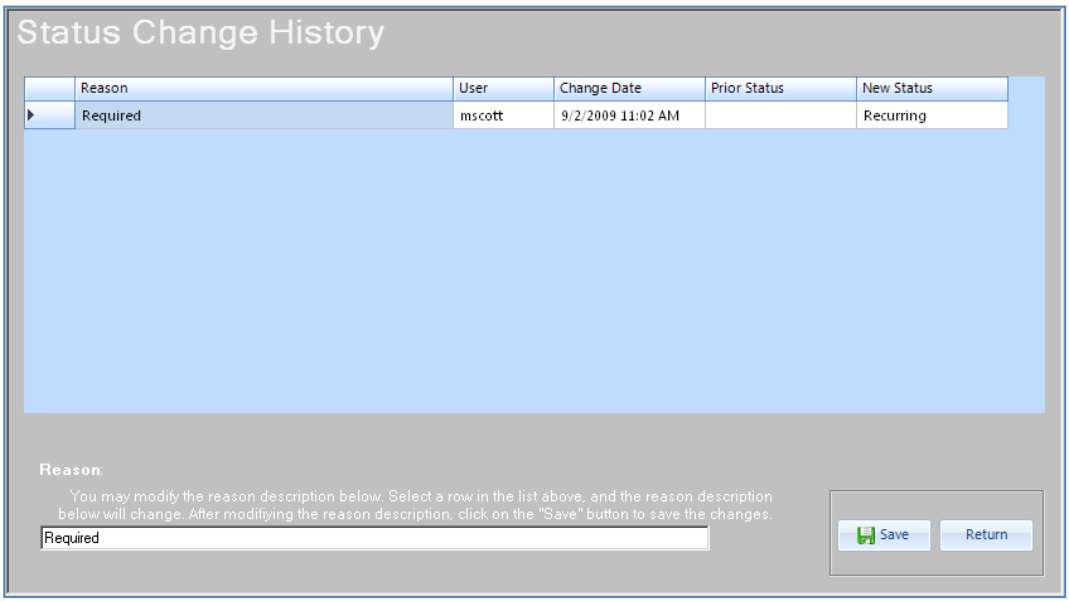
1. Enter the reason for the change in status
2. Click on the Save button



View or Modify Status Change History

View

1. The Status Change History for the patient record can be viewed by clicking on the H button next to the Patient Status field on the Profile Tab
2. Click on the Return button to return to the Patient History window



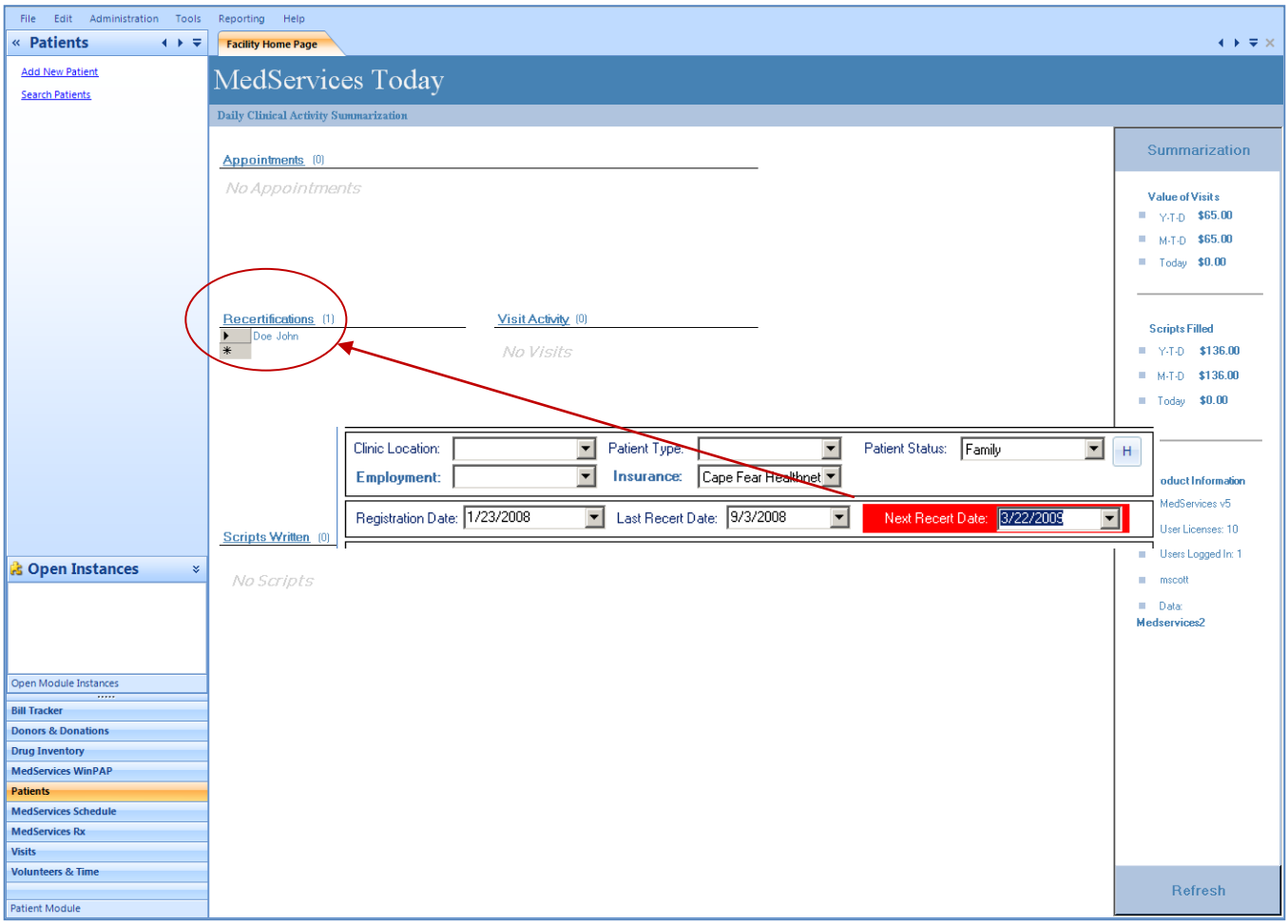
Modify

1. The Reason for the Status Change can be modified by clicking on the H button next to the Patient Status field on the Profile Tab
2. Select the Reason in the table
3. Make corrections to the Reason for the Status Change
4. Click on the Save button
5. Click on the Return button to return to the Patient History window

Important Patient Record Flags

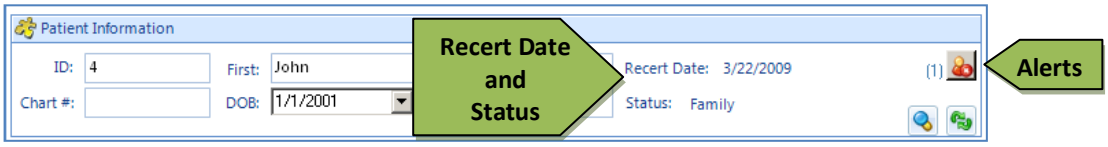
Recertification

If the Next Recert Date in a Patient's Record passes, MedServices will flag the field in the Patient's record and add the patient's name to the Recertification section of the MedServices Today page.
Update the Last Recert Date to clear the flag.



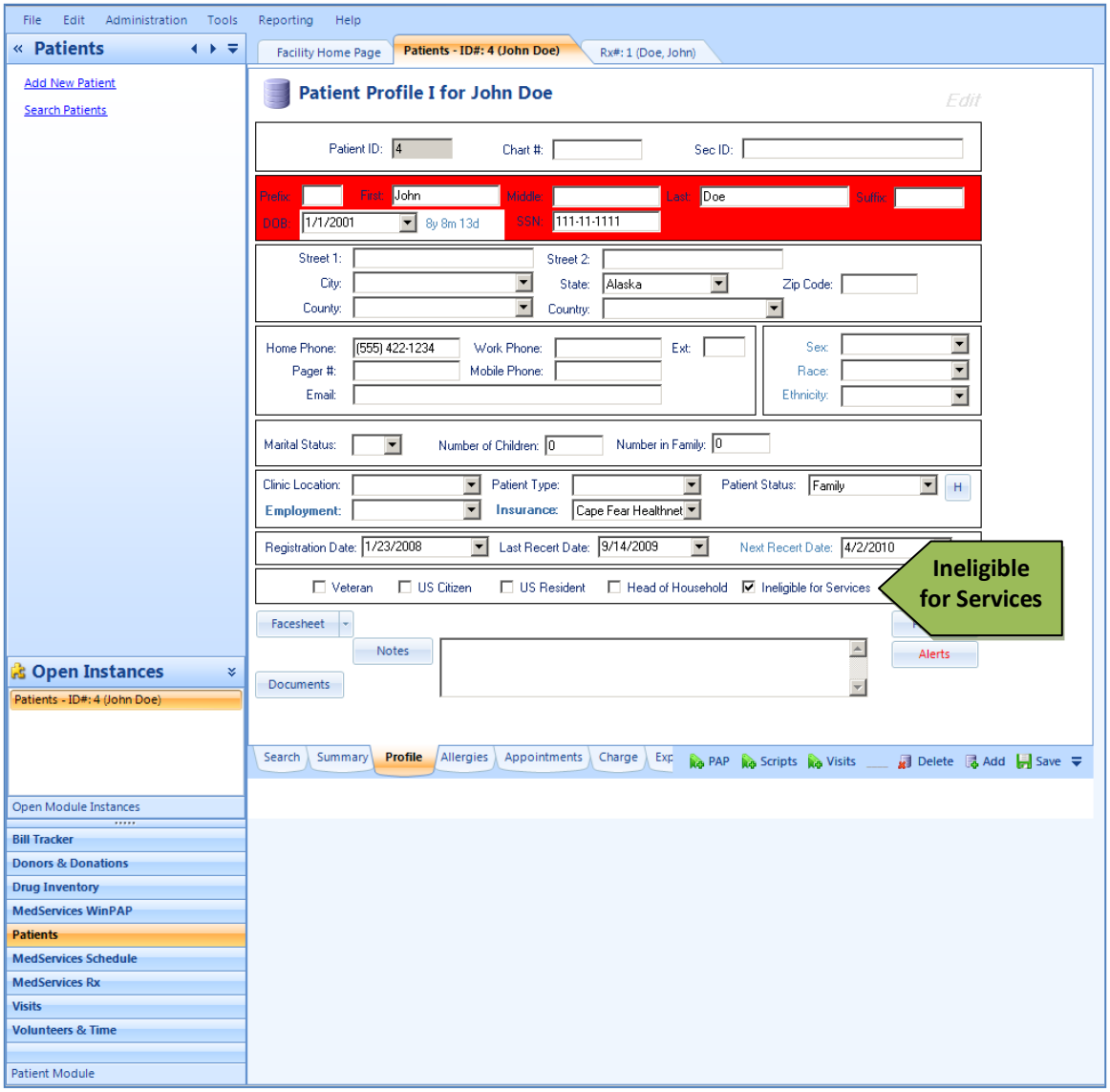
Alerts and Patient Status

The Patient Status, Recertification Date and all Alerts display whenever the patient record is accessed by any module.

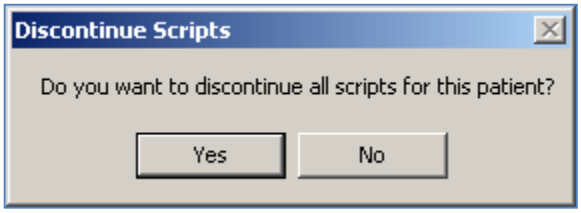


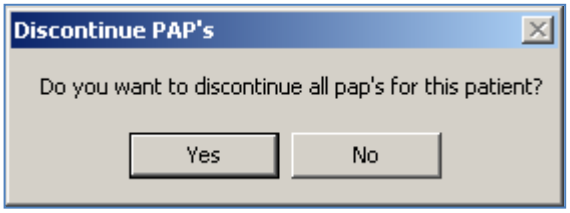
Ineligible

When a patient is checked as "Ineligible for Services" on Profile I of the Patient's Profile, the Patient Information section of the patient record is flagged **Red.**



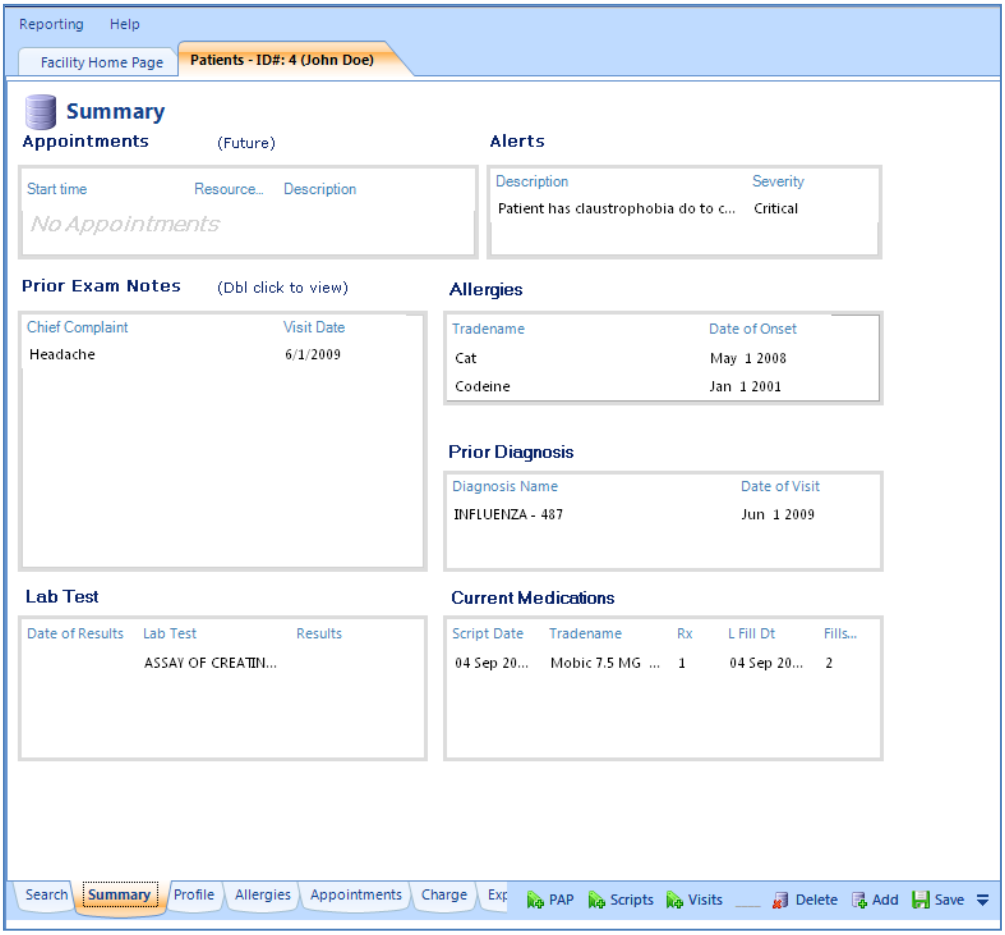
MedServices will automatically prompt the user to discontinue any prescriptions or Patient Assistance Program applications for the ineligible patient.





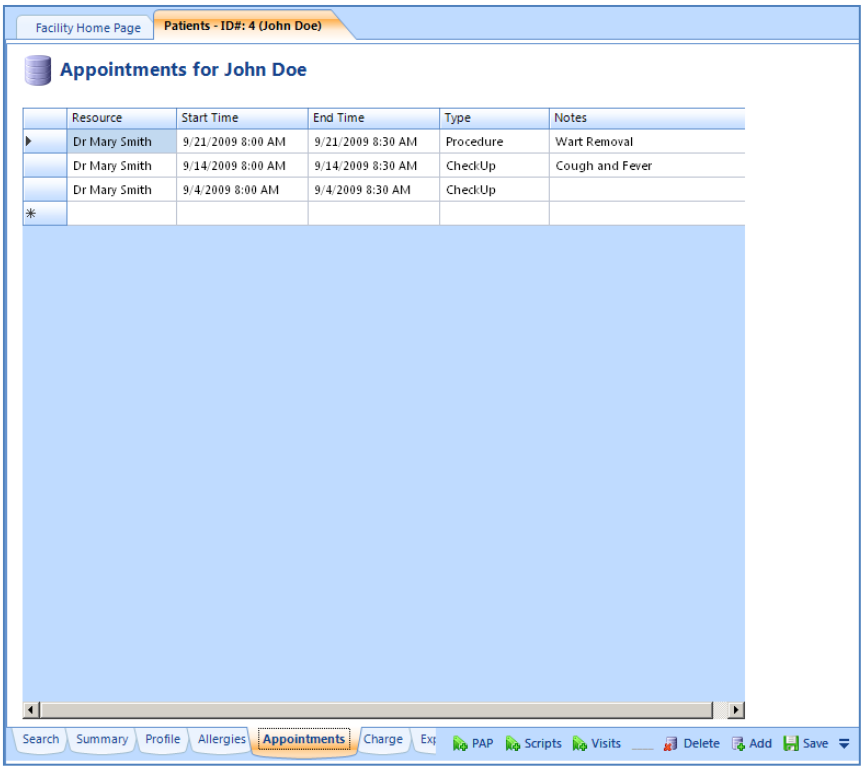
Summary Tab

The Summary Tab displays the Patient's Medical History as well as any FUTURE Appointments



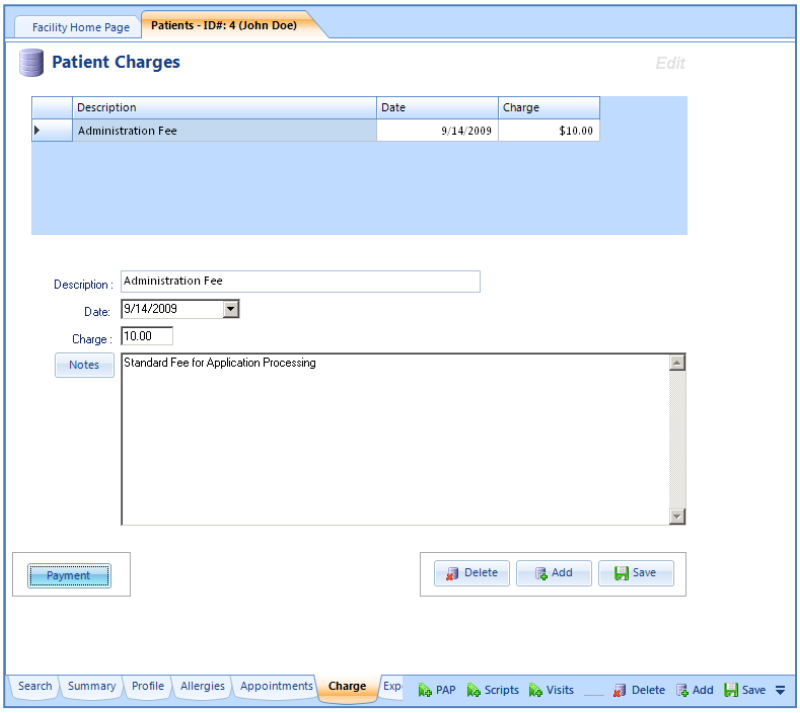
Appointments Tab

The Appointments Tab shows a history of all the Patient's Appointments PAST and FUTURE



Charge Tab

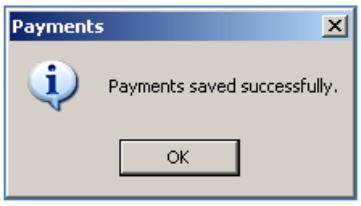
The Charge Tab is used to add non medical charges to the Patient's account. Charges associated with a patient's visit can be added in the Visit Module.



Add a Charge

1. Click on the Add button
2. Enter each system value
3. Use the Notes field to record additional details
4. Click on the Save button

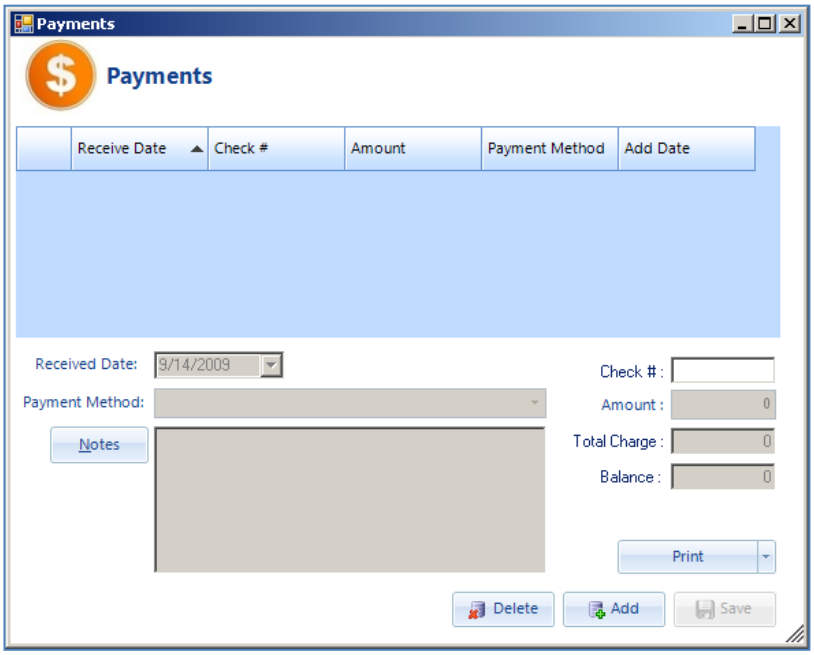
Repeat steps 1-4 to add each additional Charge



Edit a Charge

1. Select the Charge in the table
2. Make corrections to the system values in the necessary fields
3. Click on the Save button

Receive a Payment



1. Click on the Charge Tab in the Patient's Record
2. Click on the Payment button
3. Enter each system value
4. Use the Notes field to record additional details
5. Click on the Save button
6. Click on the X button to return to the Charge Tab

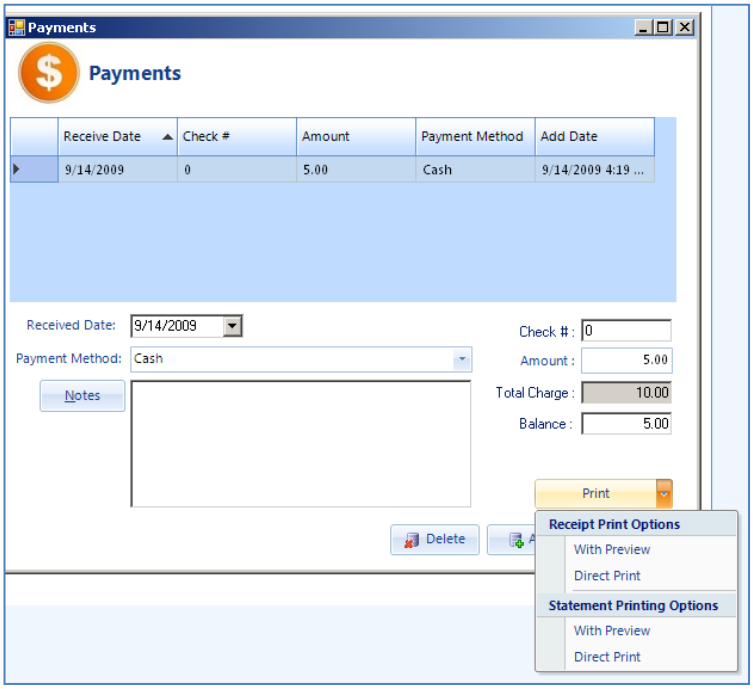
Repeat steps 1-4 to add each additional Charge

Edit a Payment

1. Select the Payment in the table
2. Make corrections to the system values in the necessary fields
3. Click on the Save button
4. Click on the X button to return to the Charge Tab

Print a Receipt or Statement

Receipts can be printed for each payment. The description of the receipt printed from the Charge Tab will show as "Non-Medical Charges." The Statement will include all details for all payments made to the Patient's account including payments for PAP, Visits, and Prescriptions.



1. Click on the Charge Tab in the Patient's Record
2. Click on the Payment button
3. Click on the Print drop down arrow to display the Payment Printing options
4. Select the desired printing option

Direct Print will send the receipt or statement directly to the default printer

5. Click on the X button to return to the Charge Tab

Preview Error for Receipts or Statements

Only one Receipt or Statement can be previewed at a time.
Close the preview window in order to view another receipt or statement.

Failed to generate receiptThe process cannot access the file 'C:\DSI\MedServices V5\Receipt.pdf' because it is being used by another process.
OK

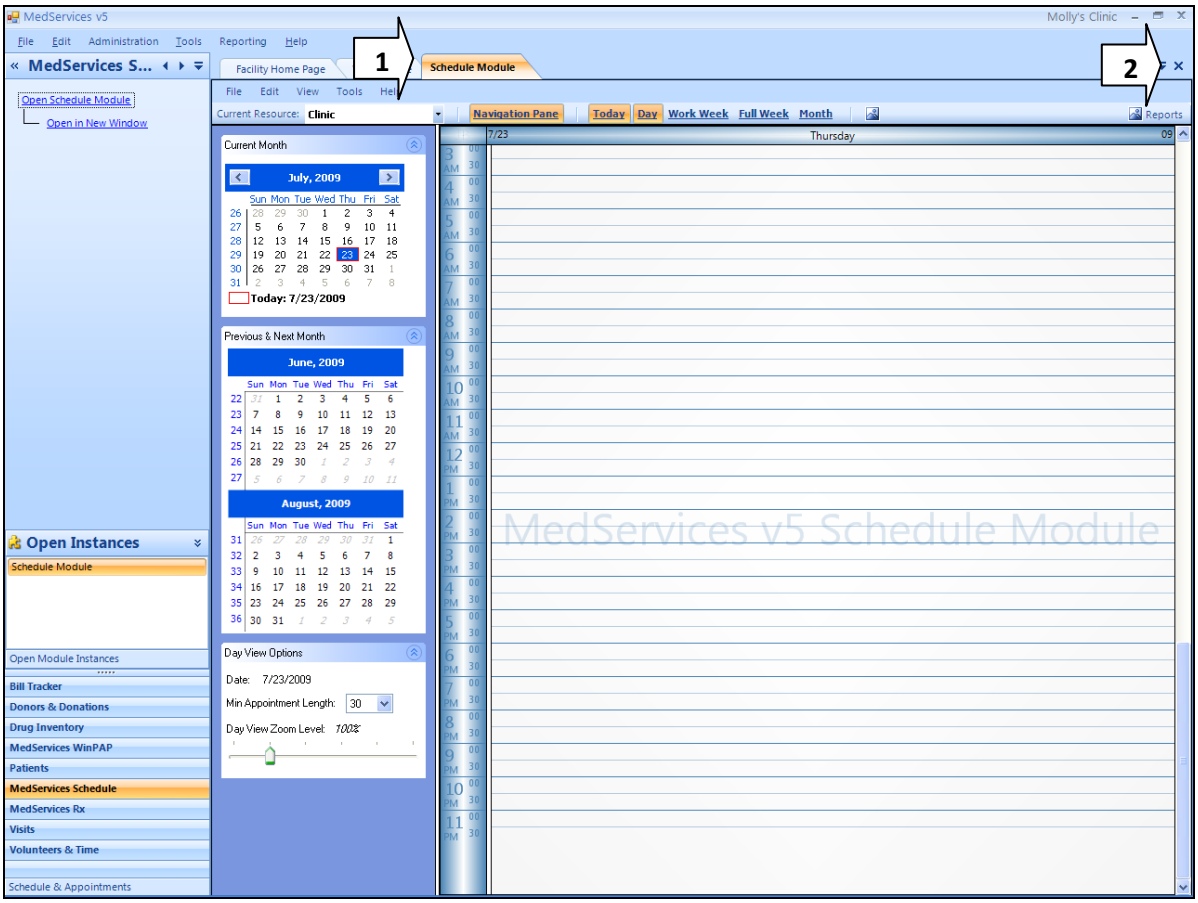
Opening another module from within the Patients Module

Instances of the WinPAP, MedServices Rx, Visits, and Add New Patient Modules can be launched from the Patients Module. The patient demographic information will automatically be loaded into the Patient Fields of the new Instance.

Closing an Open Instance of a Module

1. Click on the tab of the module to be closed.
2. Click on the X button to close the selected module.

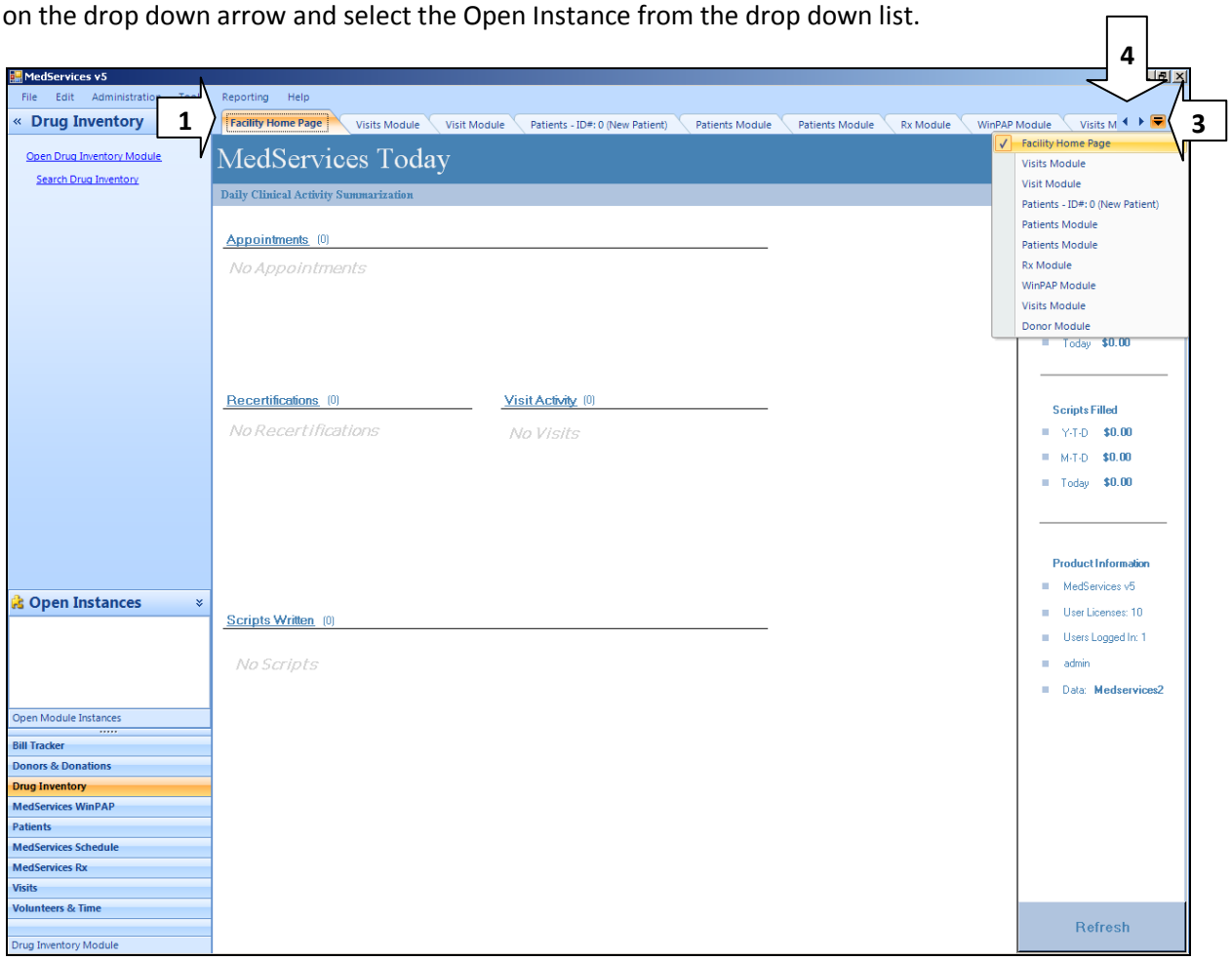
Note: The Facility Home Page tab cannot be closed.



Moving between Open Instances:

There are 4 options for moving between the Open Instances. Because a user can have multiple instances of the same module open, all of the tabs may not be visible. Use Options 2 through 4 to navigate to a tab that is not visible.

Option 1:
Click on the tab.
Option 2:
Click on any tab and then use the left or right arrow keys on the keyboard.
Option 3:
Click on the drop down arrow and select the Open Instance from the drop down list.



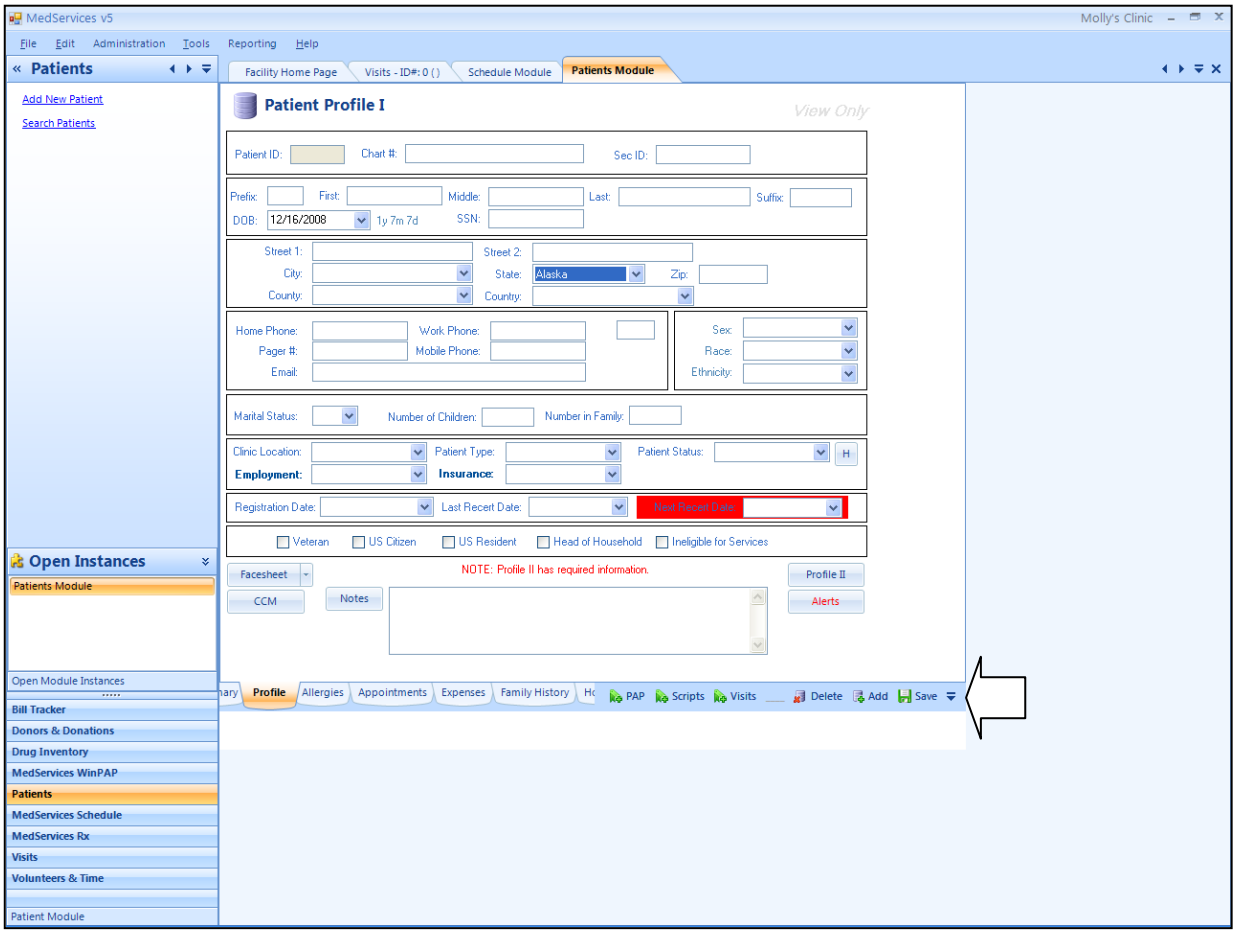
Option 4:
Use the Open Instance Navigation arrows to automatically select the next Open Instance or previous Open Instance.

Common Buttons

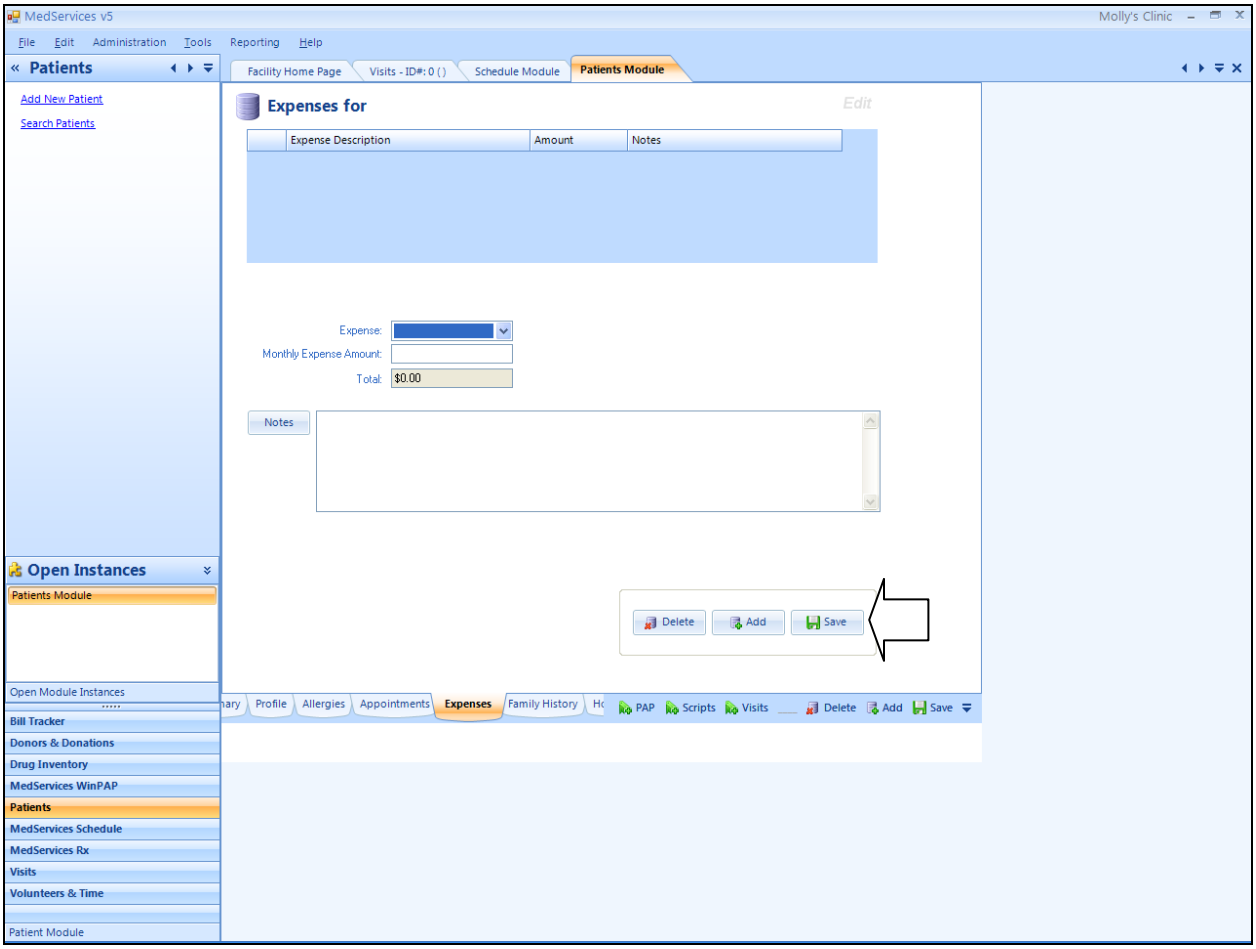
Delete – Add – Save

Delete, Add, and Save are buttons common to many modules. The location of these buttons on the screen allow the user to see if they are for the data being entered into a specific set of fields, or for the entire module.

In the Patient Profile screen below, the buttons are located at the bottom of the screen of the Patients Module. They can be used to Delete the Patient's Record, Add a New Patient, or Save the Patient's Record.



In the Expenses screen below, the buttons are located inside the screen on the Patients Module. They can be used to Delete an Expense, Add an Expense, or Save the Expense information to the Patient's Record.



The Delete, Add, and Save buttons are used throughout MedServices to manage the date being entered by the user.

Contact Information

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